

Project Title

LEASE MANAGEMENT

Team Members :

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LEASE MANAGEMENT

1. Project Overview

The objective of lease management in Salesforce development is to automate and optimize the entire lease lifecycle while ensuring seamless integration, compliance, and enhanced visibility across all lease operations.

2. Objective

I. Improved Compliance and Risk Management:

- Ensure adherence to lease terms, regulatory requirements, and internal policies.
- Identify potential risks and compliance issues proactively.
- Implement robust controls to mitigate risks and prevent financial losses.

II. Enhanced Collaboration and Communication:

- Facilitate seamless collaboration between lease administrators, finance teams, legal departments, and other stakeholders.
- Improve communication and information sharing through a centralized platform.
- Streamline workflows and reduce delays in decision-making.

III. Improved Reporting and Analytics:

- Generate customizable reports and dashboards to track key metrics and performance indicators.
- Provide actionable insights to support strategic decision-making.
- Enhance visibility into lease portfolio performance and identify trends.

3. Detailed Steps to Solution Design

➤ **Define Business Requirements:**

- **Identify Key Stakeholders:** Determine who will be using the system and their specific needs.
- **Document Current Processes:** Map out the existing lease management processes to identify inefficiencies and bottlenecks.
- **Define Functional Requirements:** Specify the core functionalities of the system, such as:
 - ❖ Lease data entry and management
 - ❖ Rent calculations and invoicing
 - ❖ Lease accounting and financial reporting
 - ❖ Document management and storage
 - ❖ Workflow management and approvals
 - ❖ Reporting and analytics

➤ **Requirements Gathering:**

Objective: Understand the business needs and document the lease management process.

Actions:

- Identify lease lifecycle stages: creation, renewal, payment tracking, termination, etc
- Define key entities (e.g., Lease, Property, Tenant, Payments).
- Capture reporting needs (e.g., upcoming expirations, overdue payments).
- Document integration requirements (e.g., payment systems, DocuSign).

➤ **Design the Data Model**

Objective: Structure Salesforce objects to support lease management.

Actions:

- Lease: Tracks lease details (e.g., start/end dates, property, rent).
- Property: Represents the leased properties.
- Tenant: Stores tenant information (e.g., name, contact details).
- Payment: Tracks payment records and status.
- Maintenance Request: Logs maintenance issues.

4. Testing and Validation:

➤ Validation Testing:

Objective: Ensure that lease details are entered correctly into the system.

Testing Steps:

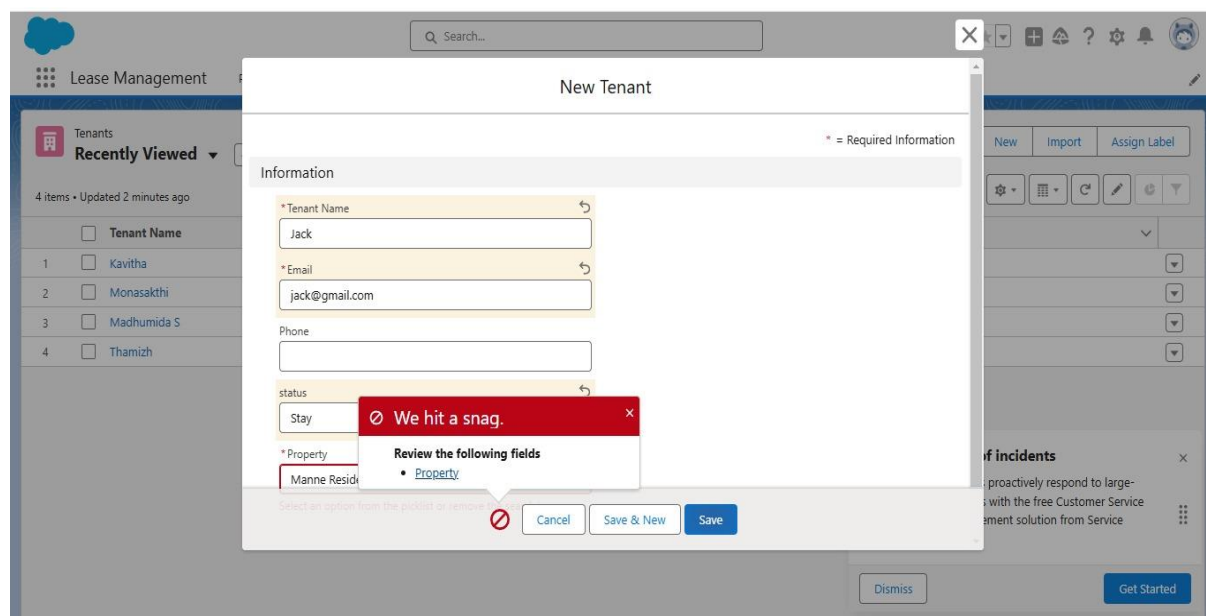
Test Case 1: Enter a new lease with basic information (tenant name, property address, rent amount, lease term).

Validation: Check if the system accurately stores this information and displays it correctly in the lease details.

Test Case 2: Input incorrect or missing information (e.g., a blank field for rent amount).

Validation: Ensure the system highlights the missing information and prevents saving the record until corrected.

VALIDATION TESTING:



The screenshot shows a web application interface for 'Lease Management'. A modal window titled 'New Tenant' is open, displaying a form with the following fields:

- * Tenant Name**: Jack
- * Email**: jack@gmail.com
- Phone**: (empty)
- status**: Stay
- * Property**: Manne Resid

A red error message box is overlaid on the form, stating: "We hit a snag." Below this, it says "Review the following fields" and lists "Property". At the bottom of the modal, there are buttons for "Cancel", "Save & New", and "Save". The background shows a sidebar with a 'Tenants' section and a 'Recently Viewed' list containing names like Kavitha, Monasakthi, Madhumida S, and Thamizh. The top of the page has a search bar and various utility icons.

➤ **User Interface Testing**

Objective: Ensure the lease management system is user-friendly.

Testing Steps:

Test Case 1: Navigate through the system to access lease details, payment information, and reports.

Validation: Confirm that navigation is intuitive and that users can easily find the relevant sections.

Test Case 2: Test form input for lease creation (e.g., adding a new lease or modifying an existing one).

Validation: Ensure the forms are easy to fill out and provide helpful error messages for invalid inputs.

5. Key Scenarios Addressed by Salesforce in the Implementation Project

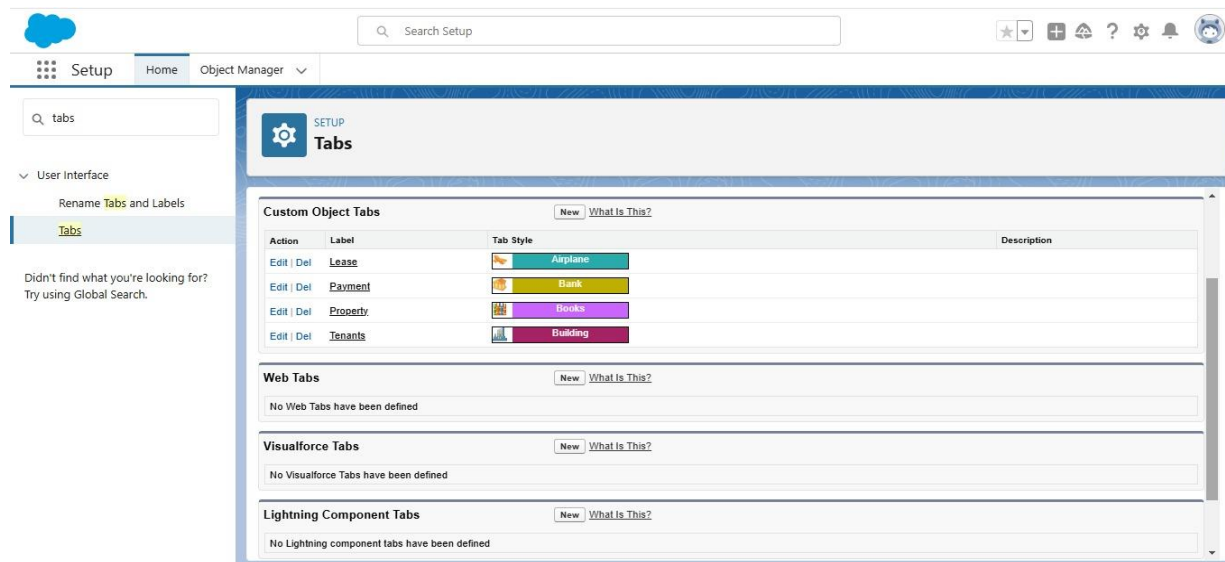
Lease Agreement Creation and Management

- Automating the process of creating, storing, and retrieving lease agreements.
- Key considerations:
 - Standardized templates for different types of leases.
 - Support for customization to accommodate unique lease terms.
 - Integration with e-signature platforms for streamlined execution.





Payment Tracking and Collection

- Managing rent and other associated payments like utilities, maintenance, and taxes.
- Key features:
 - Payment reminders for tenants.
 - Integration with online payment gateways.
 - Automated late fee calculations and notifications.

TABS

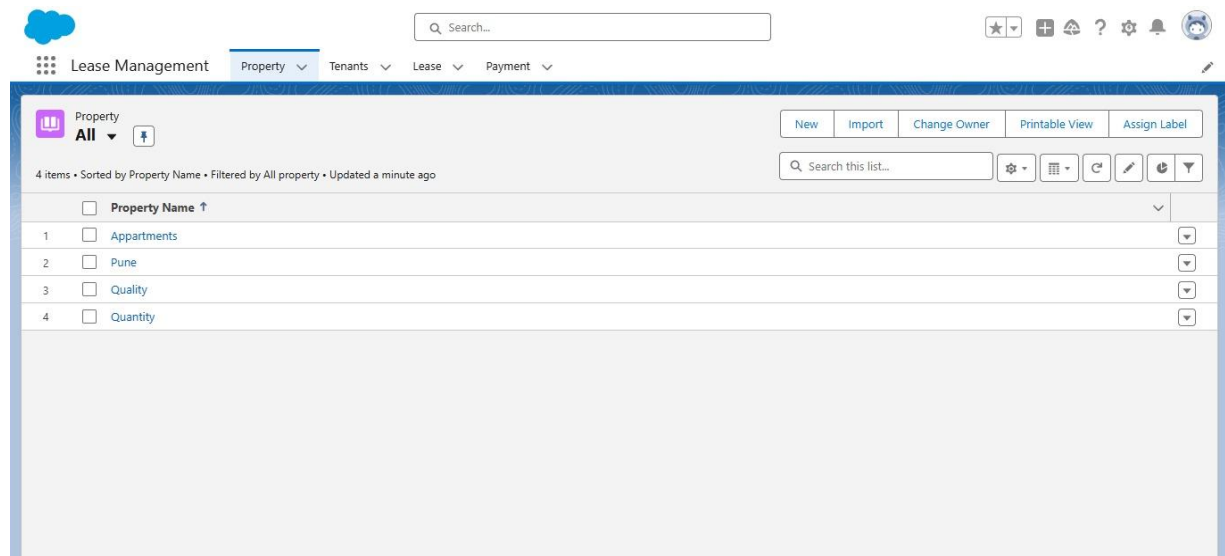


The screenshot shows the Salesforce Setup interface for the 'Tabs' section. The left sidebar contains a search bar with 'tabs' and a list of options under 'User Interface', including 'Rename Tabs and Labels' and 'Tabs'. The main content area is titled 'SETUP Tabs' and contains four sections: 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', and 'Lightning Component Tabs'. Each section has a 'New' button and a 'What Is This?' link. The 'Custom Object Tabs' section displays a table with the following data:





Action	Label	Tab Style	Description
Edit Del	Lease	 Airplane	
Edit Del	Payment	 Bank	
Edit Del	Property	 Books	
Edit Del	Tenants	 Building	

The 'Web Tabs', 'Visualforce Tabs', and 'Lightning Component Tabs' sections each show a message: 'No [type] Tabs have been defined'.

PROPERTY




The screenshot shows the Salesforce Lease Management interface for the 'Property' list. The left sidebar contains a search bar and a list of options under 'Lease Management', including 'Property', 'Tenants', 'Lease', and 'Payment'. The main content area is titled 'Property' and contains a list of properties. The list has a header row with 'Property Name' and a sort icon. Below the header, there are four rows of data:

	<input type="checkbox"/> Property Name ↑	
1	<input type="checkbox"/> Apartments	
2	<input type="checkbox"/> Pune	
3	<input type="checkbox"/> Quality	
4	<input type="checkbox"/> Quantity	

The list is filtered by 'All property' and updated a minute ago. The top of the page shows a search bar and a list of actions: 'New', 'Import', 'Change Owner', 'Printable View', and 'Assign Label'.

TENANTS:



Lease Management

Property

Tenants

Lease

Payment

Tenants

Recently Viewed

New Import Assign Label

4 items • Updated a few seconds ago

Search this list...

Tenant Name

1

Kavitha

2

Monasakthi


3

Madhumida S

4

Thamizh

LEASE :



Lease Management

Property

Tenants

Lease

Payment

Lease

Recently Viewed

New Import Change Owner Assign Label

4 items • Updated a few seconds ago

Search this list...

Lease Name

1

Dany

2

Roy

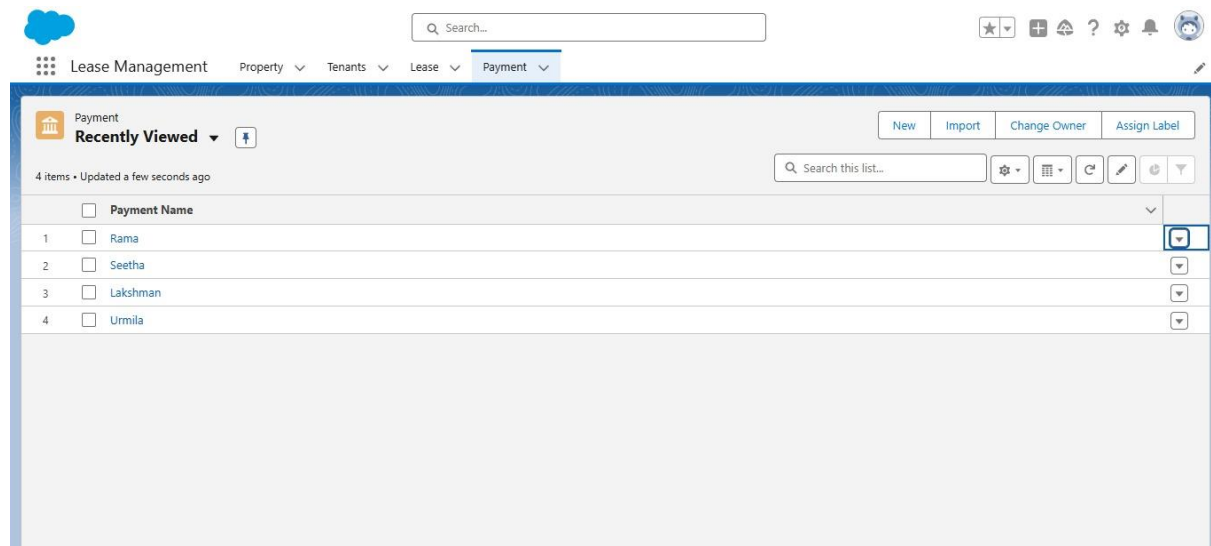
3

Jack

4

John

PAYMENT :



6. Conclusion

The successful implementation of the **Lease Management System (LMS)** has resulted in the optimization of key operational areas within the leasing process, leading to improvements in efficiency, tenant satisfaction, and business scalability.

OUTPUT :

